

# Sage BusinessVision

## Formerly known as Business Vision Accounting

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These are notes for a typical setup. For specific setup, please refer to the user manual. The user manual is available at <https://www.wellspringsoftware.com/Support/DynamicSupport/Directory.aspx>. Select the Manuals folder in the left navigation pane. The documents will display in the right pane. Choose 'PrintBoss Standard-Enterprise Manual' for this product.

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## Section 1: General Information

PrintBoss is an application that adds flexibility and features to the task of printing multi-part accounting documents on Laser printers. In spite of their superior print quality and speed, laser printers have introduced some new challenges with printing accounting documents. PrintBoss solves these problems by offering the following features:

- PrintBoss will print multiple copies of any document.
- Enable unique printing for each copy, such as a legend.
- Each copy can be printed in a different order, or to a different printer, or from different trays within the same printer.
- Allow signatures to be printed on checks with security.
- Print text or graphics based on conditions of the document (e.g. document amount)
- Document design can be enhanced

The PrintBoss application uses a special Windows Printer driver in order to interface with Sage BusinessVision. Once the appropriate settings are made in PrintBoss and Sage BusinessVision, sending a document to PrintBoss requires no extra steps for the user.

## Section 2: Setup in Sage BusinessVision

### PRINTS US AND CPA COMPLIANT CHECKS

#### AP Checks

In Sage BusinessVision, go to "File...Printer Setup...Printer Properties".

- Highlight CHECK (Cheque)
  - In the "Print To..." section, select "Printer"
  - In the "Form Name" section, select "AP Check - laser - US.rpt"
  - Check format should be check/stub/stub

**Note:** PrintBoss will format the check to print stub/stub/check

- Uncheck "Use Default Printer"
  - Click on Select Printer.
  - Choose the PrintBoss 50 printer
- Click on OK.

#### Payroll Checks

In Sage BusinessVision, go to "File...Printer Setup...Printer Properties".

- Highlight PAYCHECK (PayCheque)
  - In the "Print To..." section, select "Printer"
  - In the "Form Name" section, select:
    - Payroll Check - laser - US.rpt      or
    - Payroll Cheque.rpt                      or
    - Payroll Cheque - Laser.rpt

- Check format should be check/stub/stub

**Note:** PrintBoss will format the check to print stub/stub/check

- Uncheck "Use Default Printer"
  - Click on Select Printer.
  - Choose the PrintBoss 50 printer
- Click on OK.

### Section 3: PrintBoss Settings

The following items are suggested for the Sage BusinessVision interface. This may serve as an installation checklist if problems occur. This section is broken into 3 subsections: Required Settings (these MUST be done after the initial installation), Checklist, and Other Common Settings.

#### REQUIRED SETTINGS

##### ***FILE/PRINTER SETUP***

Select the driver matching the Laser Jet printer. The PCL5e is recommended when available. Do not use a Post Script (PS) driver.

**DO NOT select the PrintBoss 50 printer as the printer from the PrintBoss application.**

##### ***EDIT/BANK LIST***

Beginning with PrintBoss version 5.71.1, PrintBoss includes bank Wizards to make the setup easier. Simply click on Wizards and choose 'Bank Creation'. Each screen has instructions and suggestions specific to Sage BusinessVision. You will be prompted to add a Logo or Signatures after the bank specific portion is completed.

PrintBoss comes with 10 bank accounts in the Standard edition. If more is needed, a Bank Key disk will need to be purchased. Call Wellspring Software, Inc., for more information.

##### Primary Tab:

- |                                   |  |
|-----------------------------------|--|
| • <i>Bank Code</i>                | Enter the GL Account number used to identify the bank.             |
| • <i>Bank Prompt</i>              | Enter any word or phrase for user recognition.                     |
| • <i>Bank Name and Address</i>    | Fill in the bank information as it should appear on the checks.    |
| • <i>Company Name and Address</i> | Fill in the company information as it should appear on the checks. |
| • <i>Next Check Number</i>        | DO NOT fill in. The check number comes from Sage BusinessVision.   |
| • <i>Confirm Check Number</i>     | "Auto..."  |

##### MICR Tab:

- |                         |   |
|-------------------------|---|
| • <i>Routing Number</i> | Enter the bank account routing number.                            |
| • <i>Account Number</i> | Enter the bank account number. Use a period to designate a space. |
| • <i>Check Number</i>   | {CChkNo} or CCCCCC  |

##### Signatures & Logos Tab:

This tab is used if there is a signature or logo based on a PrintBoss Bank record. For these instructions, go to our website [www.wellspringsoftware.com](http://www.wellspringsoftware.com) and visit our Support Documents page.

#### CHECKLIST

##### ***OPTIONS/ PRINTBOSS DRIVER***

- |  |  |
|--|--|
| • <i>Transfer Folder/File</i>                    | {ComAppData\...\Transfer}{WinUserName} |
| • <i>Append to Transfer File</i>                 | Do Not Check                           |
| • <i>Load PB32.exe</i>                           | Checked                                |
| • <i>Configuration Settings Save Location</i>    | Local_User Registry (Standard)         |
| • <i>Capture Mode</i>                            | Always Capture                         |
| • <i>PB 50 Driver Special Settings/Spool Dir</i> | {ComAppData\...\Spool}                 |

Click OK when finished.

**OPTIONS/CONFIGURATIONS**

Please visit our website [www.wellspringsoftware.com](http://www.wellspringsoftware.com) for specific install steps if you are on a Citrix or Terminal Server environment.

Settings Tab:

- *MICR offset adjustment* Use if needing to adjust the MICR line placement. This field is work station and user specific. Default values are 0.
- *Set Globally* Checked
- *Work File Private Folder Name* {WinUserName}
- *Always Trigger/Capture Settings*
  - *Form* {ReqList}
  - *Bank* (Grayed out)
  - *PB#INFO flag overrides above* Checked
  - *Allow fragmented PB#INFO line* Checked

Click on OK when finished.

**OPTIONS/FORM/BANK REQUEST LIST**

During installation, entries for Sage BusinessVision are added to this list. If there are no entries available, either run the SETUP.EXE file again as an update or import the entries by clicking on the Import button. The request list files are stored in the PRNTBOSS\REQLIST\BUSVIS folder.

The Bank field defaults to {Request}. A bank list will appear for each check run to select a bank if this is not changed.

**OTHER COMMON SETTINGS**

**EDIT/FORMS ... (HIGHLIGHT FORM) ... EDITOR**

- \*\*BV\_AP1 and BV\_AP2 for Accounts Payable
- \*\* BV\_PR1 for Payroll

Settings Tab:

- *Copies* 0 = just the original (increase to print copies).
- *Immediate Print Dialog Method* "Start printing w/Out prompt".
- *Auto-Archiving* Typically set to "Overwrite work files at start of batch". If printing copies, please refer to the manual for more details.

Multi-Parts & Printers Tab:

These settings are work station and user specific when <Locally> is selected under "Printer & Tray Selections Saved In..." at the bottom of this tab.

- *Print Time* Original set to "Immediate". If copies are set to batch, research archiving method settings to avoid lost documents. (See user manual).
- *Source Tray* Pulls the paper from the selected tray. This is based on the current printer in the PrintBoss program. The tray names may change if the printer selection changes.
- *Destination Printer* May be used to send designated copy to a printer other than the PrintBoss default printer. This field is also used for other PrintBoss functions, such as Emailing, Faxing, and creating PDF files.

**Section 4: Using PrintBoss with Sage BusinessVision**

When checks are printed from Sage BusinessVision, print to the PrintBoss printer driver. The PrintBoss program will load and then prompt the user to select a bank account. Once the user selects the appropriate account, PrintBoss will print the check to the designated printer.